Daily Market Monitor

June 16, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	15 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23854	0.98	0.89	6.82	-3.50
BSE Sensex	76264	0.97	1.36	6.00	-5.98
BSE 100	25377	1.15	1.30	8.42	-2.17
BSE 200	11136	1.16	1.36	9.65	-1.03
BSE 500	35765	1.19	1.50	11.13	-0.51
BSE SmallCap	54335	1.46	4.21	25.72	1.81
BSE MidCap	46882	1.62	1.92	15.65	2.63
BSE LargeCap	9390	1.09	1.29	8.81	-1.49
Sectoral indices					
BSE IT	27458	1.07	1.83	-1.68	-27.44
BSE Oil & Gas	26551	1.53	-1.06	3.88	-2.25
BSE FMCG	18217	0.43	-3.23	8.60	-9.21
BSE Auto	59472	2.69	3.56	13.03	13.66
BSE Bankex	64414	0.67	6.49	13.84	2.95
BSE Teck	14700	0.90	0.91	-0.19	-19.21
BSE Capital Goods	79691	1.01	3.73	24.05	14.22
BSE Consumer Durable	59604	2.02	2.48	13.28	4.37

Turnover (Rs Cr)	15 June	12 June
BSE Cash	10587	9046
NSE Cash	138642	118838
NSE F&O	24444899	18751637

Rs. Cr (Equity)	FII Inv 12 June	MF Inv 11 June	DII Inv 15 June
Buy	12,675	12,772	21,081
Sell	13,271	10,641	17,892
Net	-597	2,131	3,189
Net (MTD)	-41,500	37,551	61,137
Net (YTD)	-286,118	282,772	437,921

	15 June	1Day	Month ago	Year ago
USD	94.68	95.38	95.93	86.10
GBP	127.31	127.84	128.09	116.56
Euro	109.91	110.36	111.63	99.32
100 Yen	59.13	59.50	60.54	59.99

RBI reference rate

Indian markets

- Indian equity benchmark indices closed Monday with a gain after the likelihood of a peace deal in West Asia eased geopolitical tensions and cooled crude oil prices, strengthening India's macro outlook.
- The top gainers were Trent, HDFC Life, Shriram Finance, Eicher Motors and Indigo—up 3.80-5.31%.
- The top losers were NTPC, Bajaj Auto, ONGC, ICICI Bank and Hindalco—down 0.80-1.58%.

Indian debt

- The interbank call-money rate ended higher at 5.35% on Monday compared to 5.20% on Friday.
- Government bond prices ended higher on Monday, driven by easing oil prices after a potential US-Iran peace deal.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.88% on Monday compared to 6.89% on Friday.

Indian Rupee

- The spot rupee ended higher against the US dollar on Monday as oil prices fell following reports of a preliminary deal being signed to end the conflict in West Asia and reopen the Strait of Hormuz.

Regulatory

- The RBI introduced a new framework allowing banks to offer differential interest rates on deposits based on Liquidity Coverage Ratio (LCR) runoffs, marking a structural shift in deposit pricing and potentially improving bank liquidity management and foreign inflow attractiveness.
- The Reserve Bank of India (RBI) clarified that payment of incentives by third parties to employees of regulated entities is prohibited, but banks and NBFCs are free to incentivise employees for sale of financial products.
- Sebi has introduced a revised framework for exchange-traded funds, replacing fixed price bands with dynamic limits and updating the method used to calculate base prices.

Economy and Government

- India wholesale prices advanced 9.68% year-on-year in May 2026, compared to a marginally revised 8.26% rise in April 2026.
- India unemployment rate rose to 5.5% in May 2026 compared to 5.2% in April 2026.
- India merchandise trade deficit stood at $28.21 billion in May, with exports at $45.2 billion and imports at $73.41 billion.
- The Embassy of India in Abu Dhabi has announced a change in the outsourced service provider handling Indian passport, visa and consular services across the United Arab Emirates from July 1, 2026
- India and Slovakia have announced a comprehensive partnership, enhancing bilateral cooperation across key sectors.
- The Centre raised the special additional excise duty (SAED), or windfall tax, on exports of diesel and aviation turbine fuel (ATF), while leaving the levy on petrol exports unchanged.

Domestic Debt Market Indicators

Instrument	15 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.35%	5.20%	5.23%	5.15%	7.00%	5.00%
3-Month T-Bill	5.26%	5.27%	5.42%	5.35%	5.40%	5.35%
6-Month T-Bill	5.50%	5.49%	5.57%	5.53%	5.51%	5.42%
1-year T-Bill	5.82%	5.85%	5.71%	5.61%	5.70%	5.50%
3-Month CD	6.70%	6.86%	6.95%	7.30%	7.35%	5.86%
6-Month CD	7.20%	7.33%	7.17%	7.43%	7.30%	6.16%
1-year CD	7.45%	7.60%	7.55%	7.07%	7.25%	6.34%
3-Month CP	7.13%	7.40%	7.68%	7.70%	7.75%	6.25%
6-Month CP	7.60%	7.68%	7.75%	7.80%	7.65%	6.55%
1-year CP	7.85%	8.00%	7.90%	7.47%	7.60%	6.77%
1-year Gilt	5.90%	6.01%	6.02%	5.78%	5.82%	5.60%
3-year Gilt	6.18%	6.20%	6.53%	6.06%	6.43%	5.84%
5-year Gilt	6.46%	6.49%	6.86%	6.43%	6.90%	5.99%
1-year AAA	7.40%	7.44%	7.71%	7.33%	7.57%	6.68%
3-year AAA	7.37%	7.39%	7.77%	7.34%	7.59%	6.80%
5-year AAA	7.43%	7.47%	7.83%	7.38%	7.67%	6.86%
10-year G-sec	6.88%	6.89%	7.06%	6.67%	7.02%	6.30%
Net LAF (Rs Cr)	172856	174022	248222	213387	245161	362410
Forex reserves ($ bn)	681.61	682.32	696.99	716.81	642.49	696.66

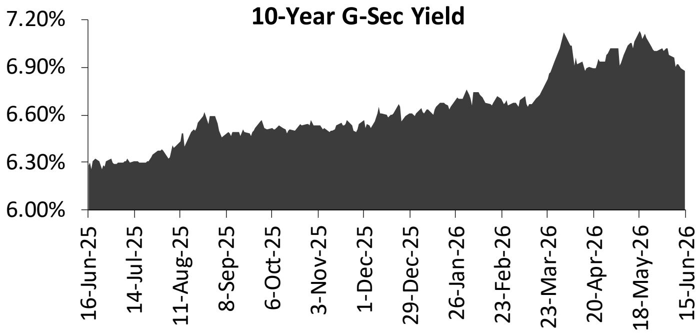
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.50	7.42	8.16	8.21	9.44	9.92
1 Year	5.90	7.40	8.14	8.19	9.42	9.90
3 Year	6.18	7.37	8.11	8.16	9.39	9.87
5 Year	6.46	7.43	8.27	8.32	9.55	10.03
10 Year	6.88	7.55	8.39	8.44	9.67	10.15

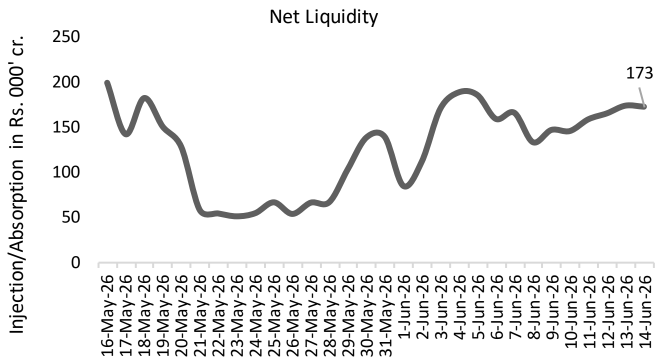
Rs. Cr (Debt)	FII Inv 12 June	MF Inv 11 June
Buy	1,726	35,231
Sell	482	45,877
Net	1,243	-10,647
Net (MTD)	4,594	-62,749
Net (YTD)	1,481	-448,758

EconomicIndicators	Latest	Quarter/Fortnight	Year Ago
CPI	3.93% (May'26)	3.21% (Feb'26)	3.03% (May'25)
WPI	9.68% (May'26)	2.18% (Feb'25)	-0.20% (May'25)
IIP	4.90% (Apr-26)	5.10% (Jan-26)	2.60% (Apr-25)
GDP	7.80% (Jan-Mar FY26)	8.00% (Oct-Dec FY26)	7.00% (Jan-Mar FY25)
India Manufacturing PMI	55.0 (May-26)	56.9 (Feb-26)	58.3 (May-25)
India Service PMI	59.8 (May-26)	58.1 (Feb-26)	61.2 (May-25)
Bank Credit Growth*	1.22% (May 31, 2026)	-0.68% (May 15, 2026)	
Bank Deposit Growth*	1.55% (May 31, 2026)	-0.12% (May 15, 2026)	

Capital markets

- Bharti Airtel shareholders have approved a Rs 28,200 crore Airtel Africa share-swap deal.
- Embassy Developments has awarded an Rs 850 crore construction contract to Leighton Asia, boosting real estate project execution and order inflows.
- Pulsus Group plans to invest Rs 500 crore to expand its AI healthcare and digital innovation hub in Telangana.
- K2 Infragen has secured a Rs 158.58 crore railway electrification order from Konkan Railway, strengthening its infrastructure order book.
- Shriram Properties has entered into a joint development agreement for a 9.1-acre land parcel in Bengaluru, expanding its residential project pipeline.
- Craftsman Automation launched Rs 2,000-crore Qualified Institutional Placement (QIP)
- Mahindra & Mahindra Financial Services received board's approval for issuance of non-convertible debentures (NCDs) worth up to Rs 1,000 crore on a private placement basis.
- Foodstories raised Rs 50 crore in funding, which will be used to expand its premium food retail footprint and scale operations in urban markets.
- Sarvam has raised $234 million in the first close of its $300 million Series B funding round.





Global market indices	15 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51671.03	0.92	4.33	11.50	22.45
Nikkei 225	69317.5	4.99	12.88	35.75	83.21
FTSE	10430.62	-0.39	2.31	2.50	17.85
Hang Seng	24842.67	0.50	-4.31	0.22	3.98
Taiwan	45396.99	2.78	10.26	43.10	105.67

Global debt	15 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.47	4.48	4.59	4.28	4.30	4.41
UK 10-Year (%)	4.83	4.84	5.18	4.84	4.88	4.56
German 10-Year (%)	2.95	3.00	3.15	2.98	3.01	2.54
Japan 10-Year (%)	2.57	2.64	2.71	2.25	2.35	1.40

Domestic	15 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	150646	1.93	-4.78	2.67	52.08
Silver (Rs / Kg)	251488	3.67	-6.34	9.28	136.88
Aluminium (Rs / Kg)	372	-1.21	-2.73	4.67	53.54
Copper (Rs / kg)	1360	1.02	1.10	16.13	55.40
Lead (Rs / kg)	208	-0.97	1.44	5.68	12.32
Zinc (Rs /Kg)	370	0.11	0.64	14.73	46.04
Nickel (Rs / kg)	1735	0.74	-4.41	6.00	31.60

Global	15 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4268.48	4.16	-8.74	-5.73	26.31
Silver (oz/$)	6906.00	8.01	-18.49	-2.00	90.62
Brent ($/bbl)	83.17	-4.76	-23.88	-29.73	12.04
NYMEX crude ($/bbl)	80.75	-4.87	-23.40	-20.35	10.65

Upcoming market indicators

Date	Indicator	Previous
June 16	India Balance of Trade, May	$-28.38B
June 17	UK Inflation Rate, May	2.8%
June 19	Japan Inflation Rate, May	1.4%
June 22	India Infrastructure Output, May	1.7%
June 25	US GDP Growth Rate QoQ Final Q1	0.5%

Global markets

- Wall Street stocks closed higher on Monday, supported by declining crude oil prices following a US-Iran deal.
- US 10yr yield ended lower at 4.47% due to easing oil driven inflation pressure following potential US-Iran peace deal.
- FTSE index closed marginally lower on Monday, dragged down by losses in oil & gas, industrial transportation and mobile telecommunications stocks.
- Asian markets were trading mostly higher at 8.30 AM.
- US industrial production increased by 1.7% year-on-year in May 2026, compared with 1.4% growth in the previous month.
- US Manufacturing production rose by 1.4% year-on-year in May 2026, following revised growth of 1.2% in the previous month.
- Eurozone Industrial Production increased 0.3% in April 2026 compared to downwardly revised 2.8% decline in March 2026.
- Eurozone recorded a trade deficit of €1,004.50 million in April 2026, while its balance of trade averaged €5,909.07 million from 1999 to 2026, peaking at €35,483 million in March 2025.
- China industrial production edged up to 4.5% year-on-year in May 2026, accelerating compared to a 4.1% rise in April 2026.
- China retail sales fell 0.6% year-on-year in May 2026, compared to a 0.2% gain in April 2026.
- China urban unemployment rate edged lower to 5.1% in May 2026, compared with 5.2% in April 2026.
- China new home prices across 70 cities declined 3.5% year-on-year in May 2026, unchanged compare with April's pace.

Commodity

- Crude oil prices fell by $4.13 to $80.75 a barrel on the NYMEX as the US-Iran memorandum of understanding signalled an end to the conflict and reopening of the Strait of Hormuz, easing supply concerns.
- Domestic gold prices ended higher due to weakness in the dollar index.

Forthcoming results

NA	NA

Source: *Domestic Indices - NSE, BSE, FII / MF (Equity) – SEBI, Domestic Derivative Statistics – NSE, Currency Movement - RBI, Domestic Economic Indicators - CRISIL Center for Economic Research, Domestic Fixed Income Numbers - CRISIL Fixed Income Database, RBI Commodity Prices – Domestic -MCX, IBJA, International- gold.org, , Respective websites, International Indices, – Respective websites, Market summaries, global bond yields, domestic and international news – CRISIL Research, Respective websites*
Abbreviations: *FII (Foreign Institution Investors), CPI (Consumer Price Index), WPI (Wholesale Price Index), GDP (Gross Domestic Product), PMI (Purchasing Manufacturing Index), P/E (Price/Earnings ratio), CP (Commercial Papers), CD (Certificate Of Deposits), G-sec (Government Securities), T-Bill (Treasury Bill), DJIA (Dow Jones), FTSE (FTSE 100), Hang Seng (Hang Seng Index), USD (US Dollar), GBP (British Pound), ,100 Yen (Japanese Yen), MTD – Month to Date, FYTD – Financial Year to Date*

**Note: Bank credit and deposit growth are calculated on fortnightly basis. #flash PMI numbers*

	Indicators	May-26	Apr-26	Mar-26	Feb-26	Jan-26	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25
Debt Indicators	Currency in circulation (Rs billion)	42826.4	42288.66	41320	40445	39800	39079	38551	38184	38071	38097
	Repo rate	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	5.50%	5.50%	5.50%	5.50%
	10-year G-sec yield	7.00%	7.02%	7.02%	6.66%	6.70%	6.60%	6.54%	6.53%	6.57%	6.59%
	Call rate	5.55%	5.20%	7.00%	5.12%	4.80%	4.85%	5.50%	5.10%	5.00%	5.45%
	Forex reserves ($ billion; mthly. avg.)	689.49	700	703	724	696	692	688	699	701	693
	GDP	NA	NA	NA	7.80%			7.40%			
	Fiscal deficit (Rs billion)	NA	3623.03	2665.2	2712.42	1255.65	-1208.29	1515.27	2520.21	-250.3	1297.37
	IIP, %y/y	NA	4.90%	4.10%	5.20%	4.80%	8.00%	7.20%	0.50%	4.60%	4.10%
	Exports, $ billion	NA	43.56	38.92	36.61	36.56	38.51	38.13	34.38	36.38	35.1
	Imports, $ billion	NA	71.94	59.59	63.71	71.24	63.55	62.66	76.06	68.53	61.59
	Manufacturing PMI	55.00	54.70	53.90	56.9	55.4	55	56.6	59.2	57.7	59.3
	Services PMI	59.80	58.80	57.5	58.1	58.5	58	59.8	58.8	60.9	62.9
	GST collections (Rs crore)	194,184	242,702	200064	183609	193384	174550	170276	195936	189017	186315
	India crude oil import (mbpd)	NA	NA	19.00	19.43	21.09	21.59	21.24	21.01	20.21	19.60
Sector update	Auto – Passenger vehicles	NA	11.60%	9.80%	12.20%	27.90%	18.59%	17.46%	0.20%	-6.90%	2.30%
	Auto – Two-wheelers	NA	19.30%	35.20%	26.20%	39.40%	21.17%	2.15%	6.66%	7.14%	8.70%
	Auto – Commercial vehicles	NA	13.60%	23.40%	27.30%	28.00%	24.16%	9.87%	25.67%	3.75%	4.60%
	Auto – Tractors	NA	29.10%	34.20%	43.00%	37.10%	30.08%	14.84%	45.39%	28.30%	8.00%
	Infra – Coal	NA	-4%	2.30%	3.10%	3.60%	2.10%	-8.50%	-1.20%	11.40%	-12.30%
	Infra – Electricity	NA	-0.50%	0.50%	3.80%	5.30%	-1.5%	-6.9%	3.1%	4.1%	3.70%
	Infra – Steel	NA	2.20%	7.20%	9.90%	6.90%	6.70%	5.90%	14.40%	13.60%	16.60%
	Infra – Cement	NA	4.00%	9.30%	10.70%	13.50%	14.60%	5.20%	5.00%	5.40%	11.60%